

**POST Requirements Management
Process Action Team (PAT) Meeting
for POST Phase 1**

**October 25, 2001
Natomas Park Conference Room 3
1:30pm – 2:30pm**

1 MINUTES (DECISIONS FROM THE 25 OCT 01 MEETING)

Regulars	Representing	Present
Mary Watson	CMIPS	Yes
Mia James	CWS/CMS	Yes
Mark Wong	EBT	Yes
Arlene Mendibles	SAWS	Yes
Dave Sakauye	SFIS	Yes
Melanie Coupe	SFIS	Yes
Craig Tueller	PM Stds	Yes
Laura Okawa	PM Stds	Yes

Meeting Visitors	Representing

Questions related to this PAT should be directed to **Laura @ 263-4120** or email: lokawa@sid.hhsdc.ca.gov. Also refer to the Best Practices website (<http://bpweb> or <http://www.bestpractices.cahwnet.gov>; note that the former is more current than the latter).

- 1.1 An overview of the POST effort and strategy was presented. The goals of this PAT were discussed. The objective is to define a generic process for requirements management that can be tailored for use throughout SID, to clarify terms and definitions to ensure we understand each other, and to identify features and requirements for the requirements management module of the enterprise-wide tool that is being discussed. (Refer to attached handout.)

Note: This PAT will not specifically focus on Requirements Development and Definition, but assumes that the requirements have already been identified and documented. Another PAT will address Requirements Development at a later date.

- 1.2 The PAT schedule was established. The same day and time slot will be kept. Members that have conflicting meetings will send comments or alternates, as possible.

Requirements Management PAT for POST Phase 1			
Mtg	PAT Focus	Date	Status
#1	Kickoff Meeting (Introductions, terms, objectives)	25 Oct 01	✓ Completed
#2	General Processes, Terms and Definitions	1 Nov 01	
#3	Discuss Requirements	8 Nov 01	
#4	Discuss Tool Features	15 Nov 01	
#5	Discuss Recommendations	29 Nov 01	
#6	Wrap up (optional)	6 Dec 01	

- 1.3 The hierarchy of requirements was discussed. In most cases, it has been the projects' responsibility to derive the business requirements from the Sponsor, Subject Matter Experts and Users via policy, regulation and other documents, and meetings and workgroups. (The Sponsor does not usually have a firm list of business requirements in any one place.)

The vendor is responsible for managing the product requirements, but must be able to show traceability to the product (RFP-level) requirements. The project sometimes retains approval of the vendor's requirements management tool.

Project requirements include contractual requirements, and in some cases, Statement of Work items as well. Usually it is the project QA staff that are responsible for managing the requirements and monitoring traceability to design, code and test items.

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- 1.4 The flow of requirements was discussed. Usually the project shares a summary of requirements changes with the Sponsor, but does not include them directly in the change control process (EBT is including the Sponsor in the change control process).

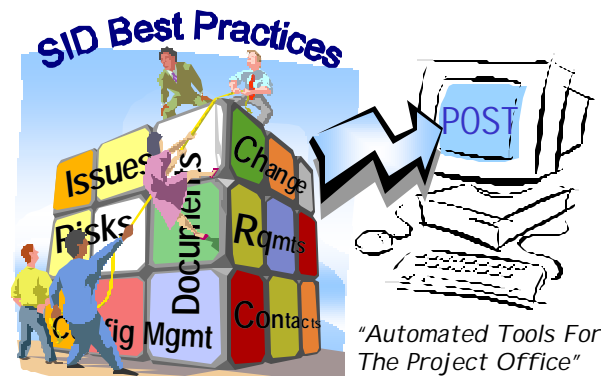
Usually the project learns of legislation or regulation changes only after the Sponsor has analyzed it; sometimes the wording and impacts to the project/system are not fully considered in the Sponsor analysis. Only CWS receives direct information from the Administration for Children and Families (ACF) on pending federal changes and works with their Case Management Support (CMS) Branch at CDSS to identify impacts.

- 1.5 The basic elements of requirements management were discussed. The key steps include managing the baseline, interfacing with the change control process and maintaining traceability.
- 1.6 Some basic terms and definitions were discussed. A definition for requirement tags will be added (an identifier for a requirement that assists with categorizing and linking related requirements).
- 1.7 Some basic features for the tool were proposed and will be discussed more in future meetings. Currently, Requisite Pro or PACS are the primary tools used.

2 AGENDA FOR THE 1 NOV 01 MEETING

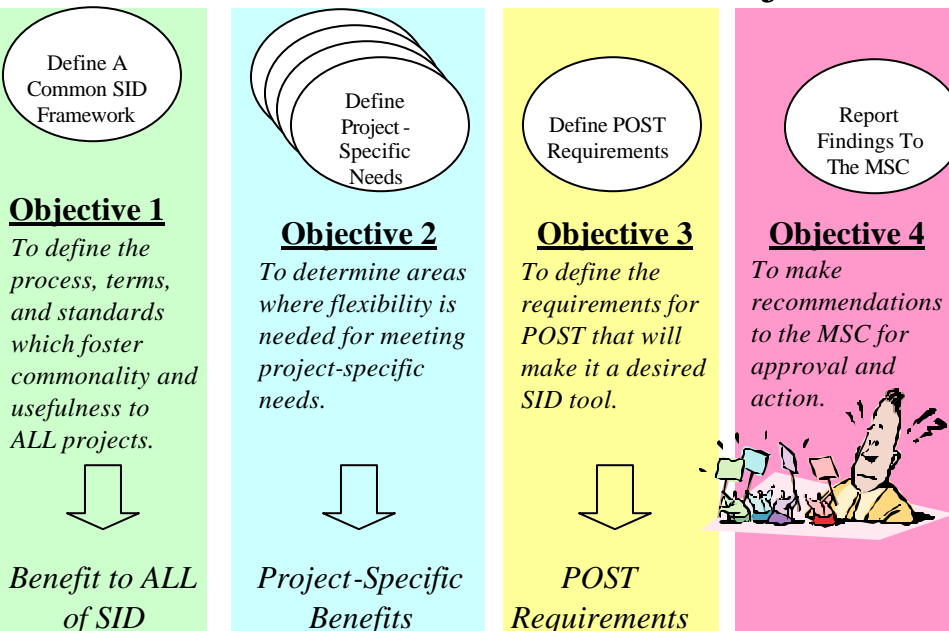
- 2.1 Discuss the terms and definitions. Identify any other terms that should be defined.
- 2.2 Discuss the process and steps to be performed in the Requirements Management process.
- 2.3 Your assignment is to review the BP web site section on Requirements Management and identify any areas for correction, clarification or discussion. (The Requirements Management area is accessed from the Life Cycle Processes link on the left navigation bar. Then select the Requirements Management Supporting process from the second row.)

POST Process Action Team (PAT) Requirements Management Phase 1 25 Oct 2001



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Process Action Team (PAT) Objectives



POST Vision

To have a common suite of tools which standardizes and simplifies the Project Office functions and operationalizes the SID Best Practices and enhances project management capabilities.

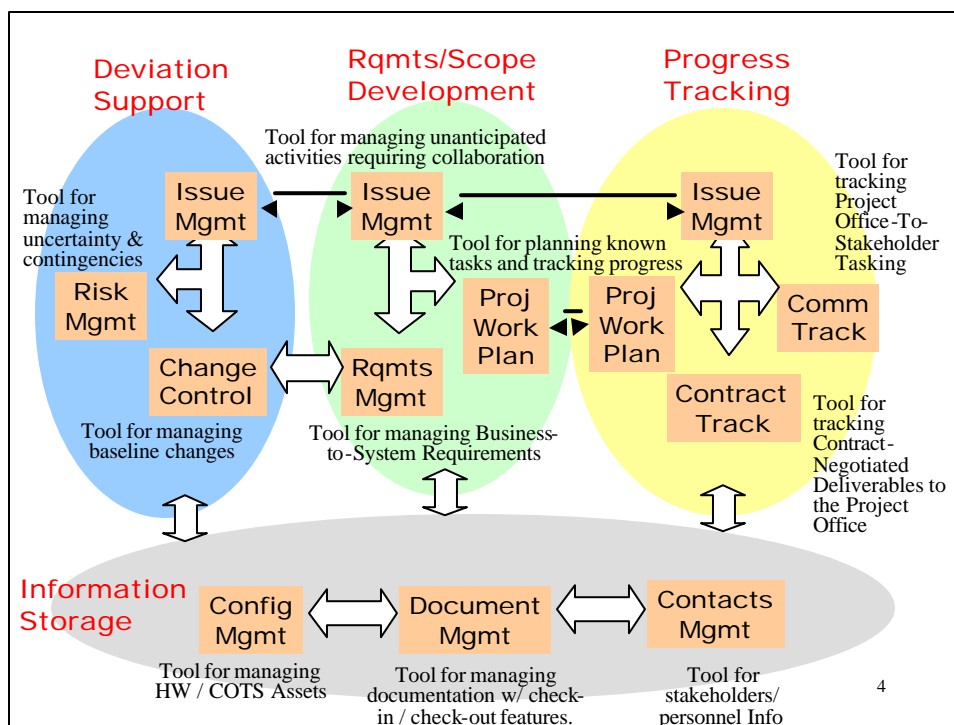
This will be accomplished in three ways:

Goal 1: Establish a suite of automated tools which is simple to use, and minimizes redundancies between project office functions.

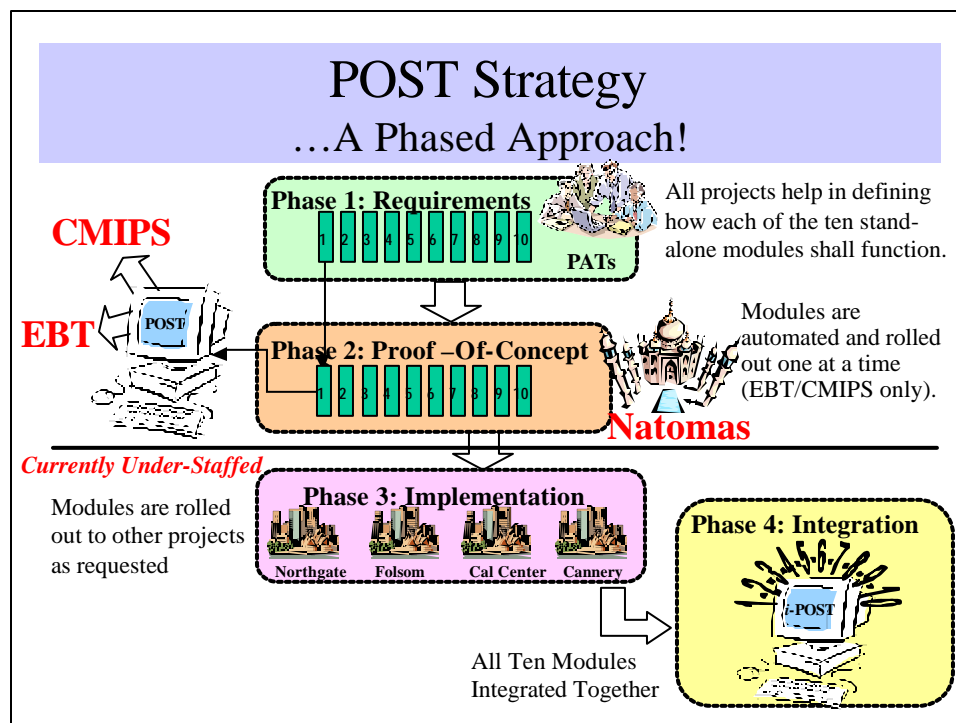
Goal 2: Equip SID employees in applying the tools towards improving project productivity and quality.

Goal 3: To enhance SIDs ability to achieve and maintain SA-CMM Level 3.

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POST Product Suite To-Date

POST Function	Current Tools	Vendor	Programmer Analyst Needed?
1. Document Mgmt	IManage	Infinisys	No
2. Issue Mgmt	MTS/PACS/PTS (MS Access)	In-House	Yes
3. Risk Mgmt	Risk Radar/PACS (MS Access)	SPMN Freeware /In-House	Yes
4. Change Mgmt	PACS/PTS (MS Access)	In-House	Yes
5. Contract Tracking	MTS (MS Access)	In-House	Yes
6. Communication	MTS (MS Access)	In-House	Yes
7. Project Work Plan	MS Project	Off-The-Shelf	No
8. Requirements Mgmt	Requisite Pro /PACS	Off-The-Shelf /In-House	No/Yes
9. Contacts	MS Outlook/MTS (MS Access)	Off-The-Shelf /In-House	No/Yes
10. Config Mgmt	None		

Project Office Support Tool (POST) Strategy

- Purpose of this PAT
 - Identify the generic process for requirements management
 - Identify common terms and definitions
 - Identify the key requirements and features needed for an automated tool
 - Identify current tools in use among SID Projects

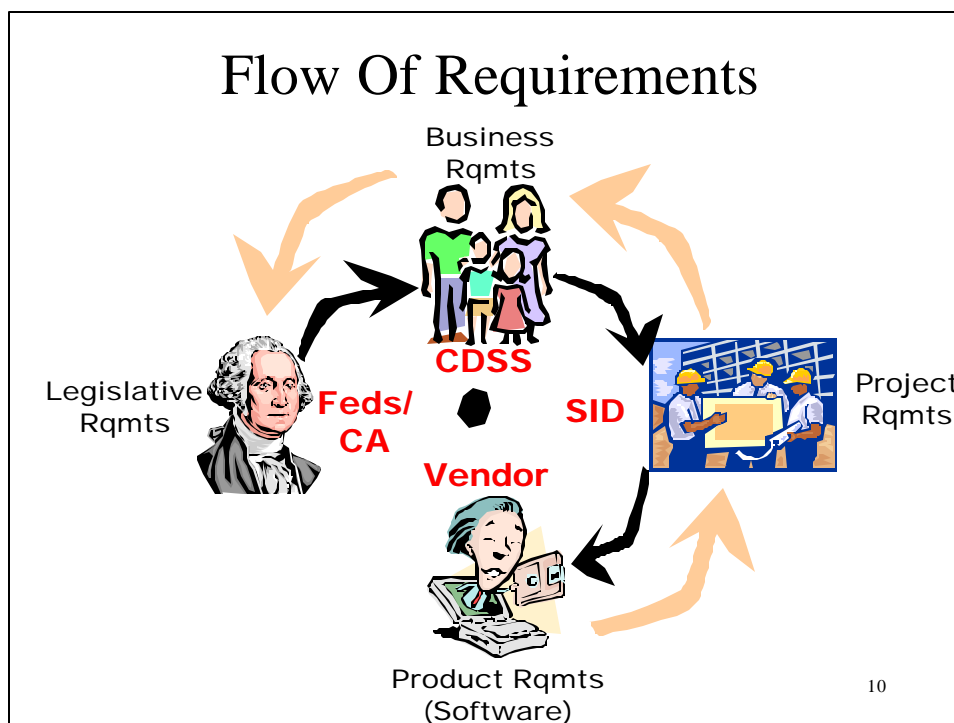
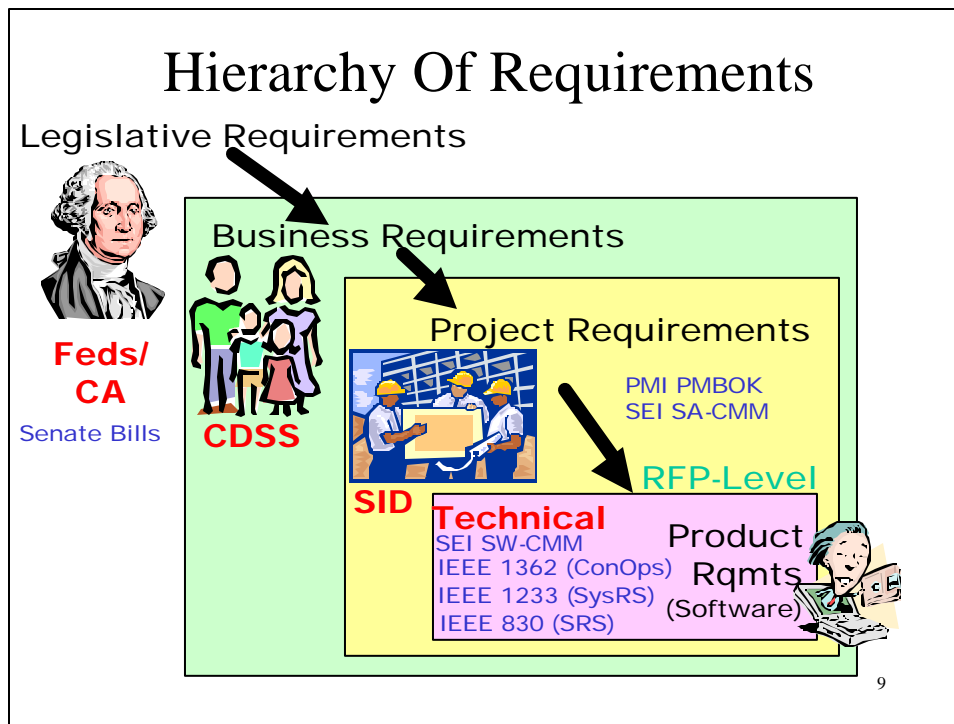
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Phase 1

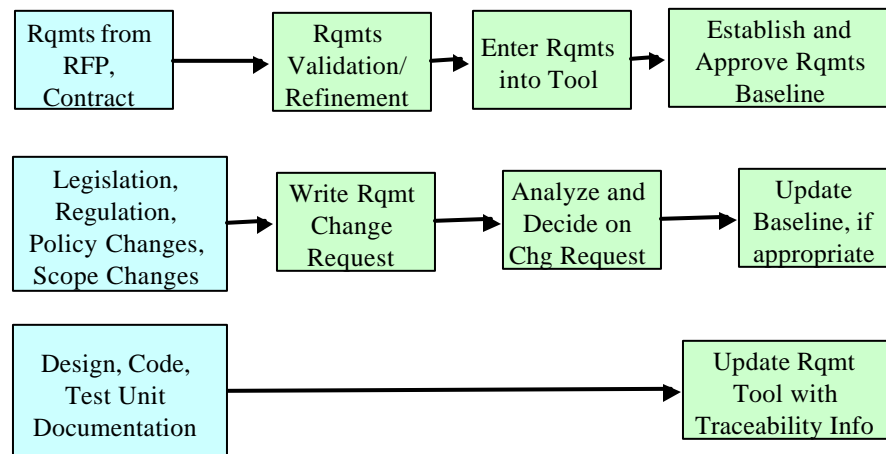
POST PAT Meetings

- ***Requirements Management*** (weekly)
 - 10/25/01 Meeting #1 Process/Definitions
 - 11/??/01 Meeting #2 Process/Definitions
 - 11/??/01 Meeting #3 Requirements
 - 11/??/01 Meeting #4 Features
 - 11/??/01 Meeting #5 Recommendations
 - 12/??/01 Meeting #6 Recommendations (opt)

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Requirements Process



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Requirements Terms/Definitions

- Requirements Management
 - The process of controlling the content and scope of a system through its requirements. Includes creation and managing of the baseline, change and version control, and traceability of requirements to source documents and work products where the requirements are implemented
- Source
 - The document or organization which established a requirement, such as legislation, regulation, policy, or user request
- Traceability
 - Relationship established between two or more products of the development process, especially having the predecessor-successor or master-subordinate relationship (e.g., legislation to requirement, and report to report fields)

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Requirements and Features

- Specific Features
 - Bi-directional traceability to multiple items
 - To source documents (backward traceability)
 - To design, code, test products (forward traceability)
 - Traceability to any level of requirements (support derived, system and software levels)
 - Ability to report on traceability gaps or show affected areas
 - Versioning and Change Control
 - Prioritizing or Identification of Criticality
 - Categorization
 - Textual and Graphical capture and storage??
 - Interface with other tools (besides POST)??

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Requirements and Features

- General Features
 - Formal recording of requirements
 - Security and Different Types of Permissions
 - Multi-User
 - Custom Sorts and Filters
 - Custom Reporting (Pre-defined and Ad-hoc)
 - Search/Find
 - Cross-referencing
 - Within requirements subsystem and to other subsystems in POST (e.g., change control, issues, etc.)
 - Running History Log and Audit Trail
 - Purging and Archiving
 - Ease of Use

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Next Meeting

- Review website Requirements Mgmt
 - <http://bpweb>
- Provide comments on processes and definitions

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